

**MANUAL OF
COLLECTIONS PROCEDURES
FOR THE
NEW MEXICO BUREAU OF GEOLOGY AND MINERAL
RESOURCES MINERAL MUSEUM**

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REVISED

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PART ONE: GENERAL MUSEUM PROCEDURES

SECTION A: INTRODUCTION

I. The Museum

- A. The Mineral Museum is a public facility founded upon the need to understand the natural mineral resources of New Mexico and preserve materials of historical, aesthetic, and cultural value. The Mineral Museum has formally existed at the New Mexico Institute of Mining and Technology since 1927, although the New Mexico College of Mines has actually maintained a mineral collection since its beginnings in 1889. The museum became part of the New Mexico Bureau of Geology and Mineral Resources (NMBGMR) in 1960. The museum exists because its function fulfills a number of activities charged to the NMBGMR as stipulated by Chapter 69 of the New Mexico Statute. This includes portions of sections:

69-1-2. Purposes and functions: ...B. to collect typical geologic and mineral specimens and samples of products; to collect photographs, models and drawings of appliances used in mines, mills, smelters, oil wells, natural gas wells and the refineries of oil and natural gas in New Mexico;... H. to make qualitative examinations of rocks and mineral samples and specimens; I. to assist in the education of miners, prospectors, and the general public through lectures and presentations;... J. to consider such other kindred, scientific and economic problems and questions as in the judgment of the board shall be deemed of value to the people of the state...

- B. The mission of the Museum is as follows:

The mission of the museum is to procure, display, and curate geological, mineralogical, and paleontological materials, primarily from the State of New Mexico, for the purposes of research, education, posterity, and enjoyment for the citizens of the state. We seek to inspire and act as a gateway to a love of science and other STEM fields.

- C. The Museum accomplishes its mission through public display of the best and most representative specimens and materials, educational programming, and interpretation of natural history information, and selective collection, preservation, research, and publication in the Museum's chosen fields.

II. Collections Procedures Development

- A. The cornerstone of any museum is its collections. It is the responsibility of the Museum to acquire natural history objects, to maintain them for use in scientific research, education and exhibitions, and to preserve the collections in perpetuity. Their acquisition and preservation are primary responsibilities of the curatorial staff and the director. A growing public awareness of museums and their accountability for the collections which are held in public trust have prompted this compilation of standards by which the museum is guided.
- B. The Manual of Collections Procedures for the New Mexico Bureau of Geology and Mineral Resources Mineral Museum (hereinafter referred to as the Manual) establishes procedures for the acquisition, disposition, and use of the collections of the New Mexico Bureau of Geology and Mineral Resources Mineral Museum (hereafter referred to as the Museum). The Manual, as approved by the Director of the New Mexico Bureau of Geology and Mineral Resources (hereafter known as the NMBGMR) represents the standard procedures for the Museum.
- C. Museum staff review and revise the Manual and recommend appropriate action in any important situation regarding collections, at the request of any museum staff, the Mineralogist, or the Director of NMBGMR. The Director and Mineralogist (or appointed curator in the absence of a staff Mineralogist) appoint committees within the Bureau, as well as consultants and advisors, as their services are needed.
- D. The Mineralogist is responsible for developing collections procedures for the Manual. These procedures are based on similar procedures established for the Denver Museum of Natural History. Dr. Virgil W. Lueth, Mineralogist/Economic Geologist, was responsible for development of all procedures this Manual during its creation in 1995. The Museum Advisory Committee reviewed the Manual, and the Director approved it.

III. The Manual

All Museum procedures will be reviewed administratively at least once every five years to ensure that they conform to prevailing standards of museum management and that they reflect any change in circumstances since the last review. All revisions of procedures must be approved by the Mineralogist, Museum Advisory Committee, and the Director of NMBGMR.

- C. The Director of NMBGMR has the authority to interpret all sections of the Manual.

IV. Collection Definitions

- A. Collections of the New Mexico Bureau of Geology and Mineral Resources Mineral Museum are defined as the anthropological, mineralogical, paleontological, and archival objects and related supporting documentation acquired and conserved because of their scientific, cultural, and historic significance, and their educational value.
- B. The term object refers to, but is not restricted to, specimens, artifacts, books, photographs, manuscripts, and artworks.
- C. Supporting documentation includes, but is not limited to, object catalogues and data files, archival and library materials, field records, maps, and exhibits.
- D. Registration files are those permanent documents and records relating to the transfer of title, provenance (history), conditions, location, accession, loan, and if applicable, disposition of the collections. The Mineralogist is responsible for the creation and maintenance of the permanent registration files.
- E. The collection is managed by the staff Mineralogist. The Mineralogist is knowledgeable in a field related to the collection in his/her care and is responsible for all aspects of curation and maintenance of that collection, including acquisition, deaccession, interpretation, or approval for exhibition, access, research, and publication.
- F. The Director of NMBGMR designates the Curator-in-charge of the collection in the absence of a Mineralogist and is responsible for management of the collection without a designated Curator-in-charge.

SECTION B: USE OF MUSEUM COLLECTIONS

I. Introduction

- A. The Museum collections are available for study to qualified individuals and institutions upon written or verbal request. Equipment, facilities, and staff expertise are provided for visiting researchers and other users upon acceptance of the request by the Museum. Loan of objects is provided to institutions or individuals for research, educational, or exhibition purposes. All Museum procedures, and collections must be respected. Due credit will be given the Museum in publications, photographs, and reproduced works, and any copyright will be appropriately protected.

II. General Guidelines on Use of Collections

- A. Collections of the NMBGMR Mineral Museum are to be used in accordance with its stated purpose of enhancing the understanding, study, and enjoyment of natural history and sciences.

This use may take diverse forms, including research, exhibition, education, and interpretation, but all must be compatible with preservation of collections and resources held in the public trust.

- B. All use must respect the physical, historical, cultural, and aesthetic integrity of the objects. Museum specimens and records cannot be altered in the course of examination or study without curatorial approval.
- C. The Museum reserves the right to allow selective access to objects in the collections. Whenever possible, legitimate requests for examination of objects will be honored. Pre-examination of photographs and other records of objects is urged, and in some cases stipulated, to minimize the exposure and handling of collections.
- D. The Museum's collections are maintained by the Mineralogist. This collection is assembled and managed in accordance with the Museum's Procedures Manual and the Mission Statement. The collections are a permanent asset of the New Mexico Institute of Mining and Technology and the New Mexico Bureau of Mines and Mineral Resources.

III. Types of Collections and Their Uses

- A. While use of collections is encouraged, it must be in accordance with preservation objectives. Use must meet the following criteria:
 - 1. Research Collections
 - a. Objects in the research collections are available for legitimate examination and research by staff, research colleagues, students, educators, and the general public.
 - b. No handling, storage, or examination techniques should alter or adversely affect the long-term preservation of the specimens. There may be instances where material would be subjected to analytical techniques involving destructive sampling or alteration of the material. Such actions must be done with the full understanding and permission of the Mineralogist, must be fully documented, and must be in accordance with the Museum procedures on sampling (see "Analytical Sampling," below).
 - c. Collections may be available to Museum staff and qualified users for teaching purposes within the Museum provided that this use does not jeopardize the condition of collections and pending approval by the Mineralogist.

- d. Research collections may be exhibited to use their interpretive potential provided that exhibition conditions are compatible with security and preservation objectives. Environmental conditions, case construction materials, mounting methods, transportation, installation, handling, and the duration of the exhibition must not damage or compromise the physical integrity of the material being exhibited. Exhibition must be accurate and balanced in its interpretation and must respect the cultural sensitivities of the museum audience.

2. Education

- a. The Museum will maintain education collections. Specimens conform to the collections procedures in content, but are not viewed as a permanent resource of the Museum. While reasonable effort is made to ensure their long-term survival through adequate storage, security, exhibitry, and handling, this material is used in an educational role and is therefore at a higher risk of damage and ultimate loss. The cultural, historical, aesthetic, and scientific integrity of these objects are respected at all times.
- b. Education collections in the natural sciences may contain materials that are toxic and cannot be handled by the public. These should be identified at all times and are subject to special storage and handling restrictions.
- c. The Museum maintains renewable materials used in educational activities that are expended in the normal course of teaching. These include raw materials of technological or domestic origin, teaching aids, field or collecting equipment, molds, etc. Their use is restricted only by health and safety concerns.

IV. Analytical Sampling

- A. To fully utilize the research potential of the Museum's collections, it may be necessary to subject samples of original material to analysis. Because sampling is destructive and permanently alters the integrity of the specimen, it must be strictly regulated. All sampling must be approved in writing by the Mineralogist. Museum records will document all sampling, location taken, and information obtained. Samples and the information they contain remain the property of the NMBGMR Mineral Museum and must be so credited at all times.
- B. Requests for sampling must fulfill the following requirements:

1. The information needed and/or sample does not already exist in the departmental files.
2. There is a justifiable need to remove a sample for analysis and the information needed could not be obtained through non-destructive means.
3. The project has merit and a reasonable chance of success and completion.
4. The technique of sampling, the amount of material to be removed, and the location on the specimen must produce as little damage as possible.
5. The method of analysis, laboratory, and proposed staff should be disclosed.
6. The information obtained from the analysis should be disseminated in a way that benefits the research and/or public community at large.
7. Samples will be returned to the NMBGMR Mineral Museum if possible for other analytical uses.
8. A report on the research analysis should be sent to the Mineralogist and Director of the NMBGMR.

V. Use of Objects for Promotional Purposes

- A. No specimen or exhibit, or reproduction of a specimen or exhibit, will be used without permission in the promotion of a product or service for commercial purposes that implies endorsement by the NMBGMR. Any request for such use, whether commercial or non-commercial, will be reviewed by the Mineralogist.
- B. Use of collection objects by the Museum for publicity is supported, and is reviewed by the Mineralogist.

VI. Personal Use of Collections

- A. Collections, other than those designated as Special Collections, are not available for personal uses including the purposes of recreation, amusement, or personal adornment. Such uses cannot guarantee the high level of security, environmental control, or handling that are prerequisites of professional collections management.

VII. Visitors to the Museum Study Collections

- A. Visitors with appointments must first check in with the Receptionist or Museum staff unless previous arrangements have been made and confirmed with written

approval. The Receptionist will call the museum staff and provide the visitors with instructions.

- B. Visitors without an appointment normally will not be admitted directly to the department study collections and facilities but may visit the museum display area.
 - 1. Visitors without an appointment may go to the Receptionist and explain their request. The Receptionist will contact the museum staff member to determine the availability of assistance.
 - 2. If assistance is unavailable, visitors should make an appointment with appropriate staff or submit a written request.
 - 3. If visitors are from out of town, Museum personnel will make every reasonable effort to assist them the same day.
- C. In cases of special groups or tours, the group or tour organizer should make prior meeting arrangements to minimize overcrowding and confusion.

VIII. Access to Collections Areas

- A. Access to collections storage areas and the collections is limited to curatorial and collections management staff or their official designees. All others, including visitors, researchers, contractors, or repairmen, must be accompanied by appropriate staff and/or have specific prior approval to have access to collections and restricted areas. In situations involving emergencies when appropriate staff are not present, campus police staff will supervise.
- B. Accessioned materials on exhibit, being prepared for exhibition, being photographed, undergoing conservation treatment, on loan to another institution, or removed from storage for any reason remain the responsibility of the Mineralogist. All matters involving access, storage, security, conservation treatments, loan requests, exhibition, change of location, or physical handling of the collections materials must be approved by the Mineralogist.

SECTION C: ACQUISITION OF OBJECTS FOR MUSEUM COLLECTIONS

I. Selective Acquisition

- A. The Museum subscribes to the philosophy of selective acquisition. Because of limited storage space, established goals, and financial and ethical constraints, it is neither feasible nor professionally responsible for the Museum to allow indiscriminate growth of collections.

- B. Objects acquired for the Museum collections should meet the following conditions:
 - 1. Priority for acquisition will be given to objects that meet the ongoing research, exhibition, and educational programs of the Museum; that fill gaps and improve the comparative series in existing collections; that represent New Mexico and the Four Corners Region; and that add to the documentation of Museum specimens.
 - 2. The Museum can meet professional standards for storage and protection and ensure the accessibility of objects for Museum purposes.
 - 3. The Museum will use objects according to tax-exempt purposes related to its Mission.

II. Authority to Acquire Objects

- A. Objects offered to the Museum through any channel must be reviewed by the Mineralogist for a decision regarding acquisition. Only the Mineralogist or Director of the NMBGMR may approve donations and purchases.
- B. All individual specimens of value must be approved by the Mineralogist.

III. Acquisition of Legally Obtained Objects

- A. The Museum shall not knowingly and willfully accept or acquire any object that was illegally imported to or illegally collected in the United States or that was received under circumstances that would encourage irresponsible damage to or destruction of biota, cultural and natural sites, or human burial places. However, the Museum may accept such objects that have been confiscated and offered to the Museum by government authorities.
- B. Should evidence be presented to the Museum that any object in its possession was acquired subsequent to the date on which these procedures were approved by the Director in violation of the principles described in this section, the Museum will conduct an investigation into the circumstances. If justified by the results of the investigation, the Museum will return the object to its rightful owner, to the extent that it is legally possible and practical to do so.

IV. Legal Documentation

- A. Every Museum staff member in a position to acquire specimens for the collections through gift, purchase, field collection, or exchange shall be reasonably assured that valid and legal title can be obtained by the Museum, or that the Museum has been granted the authority to serve as a repository by a government agency. In complying with these provisions, staff members should

consult as widely as is necessary among their colleagues. In doubtful cases, staff members may request through the Director's Office the assistance of legal counsel.

V. Transfer of Title

- A. Donations become the full legal property of the NMBGMR Mineral Museum. Any accompanying copyrights and/or literary property rights are conveyed to the Museum, except as noted on the Donation Record form. Restrictions are not encouraged and may be cause for refusal. In no case will restrictions be accepted without a termination date.

VI. Documentation of Acquisitions

- A. The acquisition of all collection objects must be documented using professional standards as outlined in departmental procedures manuals established by the Business Office of the New Mexico Institute of Mining and Technology.
- B. A legal instrument of conveyance such as a Donation Record form (see form and procedural instructions in Appendix 2), Last Will and Testament, collection ledger, or a letter of agreement setting forth an adequate description of the objects involved and the precise conditions of transfer must accompany all acquisitions. When applicable, this document must be signed by the seller, donor, or assignee and by the receiving museum staff.
- C. As appropriate, acquisitions will be listed in the departmental monthly and annual reports.
- D. Donations are acknowledged to donor by the Receipt of Donation form. Additional acknowledgment is a business letter from the NMBGMR.

VII. Prohibition of Monetary Appraisals

- A. Museum staff will not give official (legally binding) monetary appraisals of objects for which they have curatorial or collections management responsibility.

VIII. Statute of Limitations on Abandoned Objects

- A. In accordance with the New Mexico Statute of Limitations for Abandonment of Property, the Museum has the right to acquire any object left at the Museum after a minimum period of seven years unless it is part of a long-term loan agreement. These procedures do not apply to property owned by staff members.

SECTION D - CURATORIAL PROCEDURES OF THE MUSEUM

I. Addition of Specimens to the Collections

- A. Obtaining full information about the specimen in writing where possible.
- B. Filling out the Acquisition Checklist and using it as a guideline.
- C. Entering the specimen in the Accession Record Book, by the Curator-in-Charge, and obtaining an accession number for it.
- D. Numbering the specimen.
- E. Filing the specimen in one of the various collections, for storage, exhibit, or trade.

II. Accessioning Records

- A. **AQUISITION CATALOG**—gives information on the name of the specimen, locality, source, date and museum location.
- B. **ACCESSION RECORD AND CHECKLIST**—serves as a worksheet for the accession process.
- C. **CATALOG CARDS**—a file card is typed for each specimen that is accessioned. There is one catalog for all of the following collections:
 - Gem Collection
 - Meteorite Collection
 - Micromount Collection
 - Mineral Collection
 - Rock Collection
 - Fossil Collection
 - Mining Artifact Collection
 - Mineral Product Collection
 - Lapidary Collection

The catalog card is kept in a separate card catalog (physical catalog), separate from the electronic catalog.

- D. **SPECIMEN CARD**—is typed from the catalog database and placed in a tray numbered for each individual specimen and accompanies the specimen when it is placed in the collection storage cabinets.
- G. **DATA FILE**—contains articles on specific minerals in the collection. **ACCESSION RECORD AND CHECKLIST** and **CATALOG CARD** are to be marked: **SEE DATA FILE FOR CATALOGUED SPECIMEN.**

III. Accession Procedure

- * Caution: Handle specimens only on edges, very carefully.
 - * Obtain complete information about specimen before proceeding.
- A. The Mineralogist will enter any new specimen in the **AQUISITION CATALOG** and assign the specimen a catalog number if the material is to be kept or traded. An invoice numbering system will be assigned to material initially earmarked for sale. This book is organized by aquisition date and is sequential. The entries should only be entered by the Mineralogist. The AQUITION CATALOG is kept in a secure location by the Mineralogist.
 - B. Complete the **ACCESSION RECORD AND CHECKLIST (AR&C)** for the specimen. This form serves as a worksheet for the accessioning process.
 1. **CATALOG CARD.** These guidelines will be followed.
 - a. The pertinent data about the specimen should be entered in the following format for the REFLEX database program:

NUMBER:
 NAME:
 VARIETY:
 PSUEDOMORPH:
 ASSOC 1:
 ASSOC 2:
 ASSOC 3:
 LOCAL 1:
 LOCAL 2:
 LOCAL 3:
 LOCAL 4:
 LOCAL 5:
 DONOR:
 TRADE:
 PURCHASE:
 MISC:
 MISCELLANEOUS:
 CONFIRMED:
 MUSEUM LOC:
 VALUE:
 DATE:

1. NUMBER: specimen number assigned from aquisitions catalog.

2. NAME: mineral name (accepted by the International Mineralogical Association - use the current edition of *Glossary of Mineral Species*).
3. VARIETY: variety name if applicable.
4. PSUEDOMORPH: identify psuedomorph form, if applicable.
5. ASSOC 1: most abundant or important associated mineral species in specimen.
6. ASSOC 2: second most abundant associated mineral.
7. ASSOC 3: least abundant associated mineral (list additional minerals separated by commas, if needed).
8. LOCAL 1: country of origin.
9. LOCAL 2: state or province.
10. LOCAL 3: county or governmental subdivision.
11. LOCAL 4: mining district or nearby town.
12. LOCAL 5: mine name, level, other detailed location data.
13. DONOR: name of donor and donation number
14. TRADE: name of trading party (individual and/or company)
15. PURCHASE: name of seller (name or company)
16. MISC: other information about the specimen.
Historical, anecdotal, etc.
17. MISCELLANEOUS: location of specimen in museum:
display, reserve, trade, or sales.
18. CONFIRM: confirmation by anaysis; x-ray diffraction (XRD), x-ray fluoresence (XRF), scanning electron microscope (SEM) with energy dispersive spectroscopy (SEM-EDS), electron microprobe analyser (EMA), transmission electron microscope (TEM), and other methods spelled out.

19. **MUSEUM LOC:** current location of specimen (display name, reference storage, deaccession number)

20. **VALUE:** purchase price or appraisal value

21. **DATE:** date of purchase, trade, or donation.

2. **CARD CATALOG** - A card catalog card is typed in a standard format. The format of the card is in Appendix 3.

Name of Species and Associated Minerals

Detailed Location

General Location

Aquisition Method: Name, Price, Date

Catalog Number

3. **SPECIMEN CARD** - A specimen card is generated by the catalog database and printed for each specimen. The specimen card contains the entire catalog entry. The specimen card is kept in a tray with the specimen. The specimen card is kept in the tray in its proper storage location, even if the specimen is on display. All other specimen documentation (old labels, etc.) are also kept in the tray, under the specimen card.

4. **NUMBERING OF THE SPECIMEN** - A specimen is numbered with a museum number tag secured by DUCO cement. After the cement dries, the label is coated with a layer of clear acrylic.

5. **STORAGE** - The specimen is stored alphabetically in steel cabinets. Drawers within the cases are arranged by locality, New Mexico first. Micromount, Gem, and Rock collections have separate storage cabinets and are filed alphabetically.

6. **DISPLAY** - A specimen on display requires a display label containing the following information: An example of the display card is in Appendix 3.

Name and Chemical Formula

Detailed Location Information

County, State or Province, Country

Donor Information (if applicable)

7. **TRADE** - A specimen determined to be trade material is cataloged and stored similar to the reserve specimens, until traded.

8. **SALE** - A specimen determined to be sales material is assigned an invoice number and stored or displayed in the sales case until sold.

V. Data Filing Procedures

- A. Note location (display, storage, loan, etc.) on card and in electronic database.
- B. File cards in appropriate files.
- C. Make note of any problems in a drawer, such as missing or misfiled specimens, and notify Curator-in-Charge.
- D. Correct errors such as unprotected, fragile specimens or missing cards.

VI. Specimen Storage Procedures

A. Preliminary Checks:

1. Make sure that CATALOG CARDS are complete
2. Check TRAY LABEL
3. Check other specimens in the drawer to see that they are filed correctly.

B. Registration Numbering

1. Select flat spot on back, or lower side of specimen.
2. DUCO cement
3. Apply number tag—let dry.
4. Cover number tag with nail polish—let dry.
5. Clean up

C. Placement of Minerals in Storage Drawers:

1. Check identity of mineral by number, if not done above.
 - a. on specimen
 - b. on specimen card
 - c. on original card, if available (all original labels should be printed with catalog number of the specimen)
 - d. on tray
2. Check number of minerals in drawer of same species or alphabetic nature.
 - a. specimens should be numbered decimally (1000, 1000.2, etc.)
 - b. mineral card should identify numbers similarly—be sure numbers correspond to number of specimens in box.
3. Type specimen card, if necessary

- a. use capital letters for name of specimen
 - b. indicate number of specimens, if more than one in () after name
 - c. fill in any missing information
 - d. be sure numbers on tray label correspond to number of specimens in box (i.e. three specimens = (3))
4. Clean out debris from box.
 5. Trim label if necessary to fit into box without binding.
 6. **WRAP FRAGILE, WOBBLY AND/OR NON-FLAWED CRYSTALS**
 7. Enclose original labels in a small, sealable (ziploc) plastic bag.
 8. Cover all numbers on specimens with clear acrylic, if not already done.
 9. Check proper placement of specimen in drawer .
 10. *MAKE NOTE OF ANY MISSING MINERALS*. Call to the attention of the Curator-in-Charge.
- D. Close-out Procedures:
1. Replace all equipment to proper place.
 2. Turn off, unplug and cover typewriter.
 3. Make backup of catalog on D drive.
 4. Turn off computer and lights.

SECTION E: DEACCESSION AND EXCHANGE PROCEDURES

I. Deaccession Procedures

- A. The NMBGMR Mineral Museum may, from time to time, deaccession material. The Museum's deaccession procedures apply to all accessioned collection objects owned by the Museum.
- B. Objects shall have permanency in the collections as long as they retain their physical integrity, identity, and authenticity; continue to be relevant and useful to the Museum's purposes and activities; and can be properly stored, preserved, and used.

- C. The Museum may propose an object for deaccessioning when one or more of the following conditions exist:
1. The object is no longer relevant or useful to the purposes and activities of the Museum.
 2. The physical integrity of the object is in danger.
 3. The object has deteriorated beyond usefulness.
 4. Authenticity is discredited.
 5. The object lacks or has inadequate documentation that critically reduces its usefulness.
 6. A better specimen (determined by the Mineralogist) is procured and the lesser-quality specimen can be traded or sold.
 7. An important specimen (determined by the Mineralogist) is available for trade and the specimen in possession is deemed less relevant to the mission of the museum.
- D. No deaccession of the following should occur: type specimens; unique or extraordinary specimens, objects given to the museum from federal lands; or significant specimens figured, published, or photographed in a professional or scientific reference.
- E. Preference is given to retaining, within either New Mexico or the United States, material that is part of our historical, cultural, or scientific heritage.
- F. Consideration may be given to placing deaccessioned objects, through gift, exchange, or sale, in another tax-exempt public institution wherein they may serve the purpose for which they were initially acquired.
- G. If objects are offered for sale, it must be in a manner that will best protect the interests, objectives, and legal status of the Museum and adhere to the highest ethical standards. Objects shall not be sold to permanent Museum employees. Income derived from the sale of deaccessioned objects will not be used to defray ongoing operating expenses, but will strictly be used for enhancement of the collections.
- H. If the avenues of gift, exchange, or sale are inappropriate for material of no value, this material may be disposed of following all remaining deaccession procedures.
- I. Gifts to individuals from Museum collections are allowed at the discretion of the Mineralogist if the specimen value does not exceed \$100.00. Gifts of specimens

which have a value which exceeds \$100.00 requires written approval of the Director.

- J. Before any object is deaccessioned from the collections, reasonable efforts will be made to ascertain that the Museum is free to do so. Where restrictions as to use or disposition of the object are found, the Museum will act as follows:
 - 1. Mandatory conditions will be strictly observed unless deviation from their terms is authorized by the Mineralogist and/or the Director.
 - 2. Objects to which restrictions apply will not be deaccessioned until reasonable efforts are made to comply with the restricting conditions. If the value of any such object exceeds \$1,000, the Museum will make reasonable efforts to notify the donor, if living, if it intends to deaccession the object.
 - 3. If there is any question as to the intent or the force of the restrictions, the Museum will seek the advice of legal counsel.
- K. It is the responsibility of the Mineralogist or a designee to retain in the department full legal documentation of the terms and conditions governing all deaccessions. A Record of Disposition form and procedures for its completion are found in Appendix 4.
- L. In considering the deaccessioning of any object with a value which exceeds \$500.00 from the collections, the judgement of the Museum Advisory Committee must be sought and followed. Subject to the deaccession procedures, the Mineralogist may recommend the gift, exchange, sale, or disposal of objects in the interest of improving the collections or when the objects no longer have relevance for the Museum's purposes.
- M. Transactions whereby the valuation of objects to be deaccessioned exceeds \$500 must be approved by the Director of the NMBGMR.
- N. A permanent record of the conditions and circumstances under which objects are deaccessioned and disposed of will be maintained.
- O. Objects are defined as deaccessioned when they are permanently removed from the collections.

II. Deaccession Procedures

A. Deaccessioning Recommendation

1. The curator-in-charge will have the discretion to deaccession material from the museum if the value does not exceed \$ 500.00.
2. Specimens which exceed \$500.00 value will be subject to review by the Museum Advisory Committee and approved by the Director.

B. Committee Decision

1. The Museum Advisory Committee must be unanimous in its approval of a curator's deaccession recommendation for specimens with value above \$500.00.

C. Disposition of Deaccessioned Objects

1. The method of disposition must be in keeping with stated procedures

D. Identifying Marks

1. The Curator-in-Charge is responsible for ensuring that registration numbers, or any other mark that might identify the object as once part of the Museum collections, are correct.

E. Collections Records

1. After a deaccessioned object has been disposed of, the object's records are updated to reflect the method and date of disposition.

III. Exchange Procedures

A. Exchanges are formal reciprocal transfers of material between institutions involving legal transfer of ownership. All exchanges are considered unconditional in nature, and all property so received may be used at the discretion of the recipient. Exchanges should be mutually beneficial and advance the causes of collection growth and scientific, educational, and exhibition objectives.

B. Exchanges are preferable to transfer by sales.

C. Material to be exchanged must be shown to have a clear title and be free from restrictions, liens, or other encumbrances.

D. Accessioned objects must be deaccessioned according to the Museum's deaccession procedures prior to any exchange arrangements or agreements.

E. All exchanges must be documented on the Exchange Agreement form (see form and procedural instructions in Appendix 5).

- F. Exchange agreements in which objects total \$500 or more must be unanimously approved by the Museum Advisory Committee and the Director.

IV. Exchange Procedure

- A. Deaccession any accessioned objects prior to exchange (see Record of Disposition in Appendix 4).
- B. Research clear title, restrictions, and/or encumbrances.
- C. Establish the value of objects.
- D. Complete the Exchange Agreement form (see Appendix 5).
- E. If necessary, obtain approval of Museum Advisory Committee and Director.
- F. Remove any registration numbers or any other mark that might identify the object as once part of the Museum collections.
- G. Update records to document the exchange. Accession and/or catalog numbers of exchanged objects must not be reused.

SECTION F: OUTGOING AND INCOMING LOANS

I. General Loan Procedures

- A. Objects may be temporarily removed from or received into the collections by loan.
- B. It is the responsibility of the Mineralogist to obtain for and retain in the department full legal documentation of the terms and conditions governing loans (see forms and procedural instructions in Appendix 6).
- C. Objects may be loaned, or recommended for loan, by the Mineralogist when the purposes of the Museum can best be served by such action.
- D. Proper care in handling and transportation of loan objects is essential to prevent deterioration and damage. Standardization of procedures is impossible considering the diversity of Museum holdings. However, curators or collections managers are responsible for setting extremely high standards for packing and shipping according to the nature of their collections and for ensuring that these standards are met.

II. Outgoing Loan Procedures

- A. No outgoing loans of type specimens will occur unless imperative for conservation or scientific research.
- B. Loans may be considered for unique, extraordinary, or significant specimens that have been figured, published, or photographed in a professional or scientific reference the Mineralogist's discretion.
- C. Loans will be made for a period of one year or less. If extensions to the initial period are granted, they must be reviewed by the Mineralogist and written documentation of the extension must be provided.
- D. The borrower will agree to assume financial responsibility for all materials on loan from the Museum if lost or damaged unless insurance arrangements are made with the approval of the MNBGMR.
- E. It is recommended that all loan material have insurance coverage. However, procedures vary with individuals and institutions. Unless otherwise noted, all costs of wall-to-wall insurance, packing, and transportation shall be borne by the borrower, as well as any additional charges that may be incurred through necessary conservation or appraisal. A certificate of insurance, if required, will be furnished to the NMBGMR.
- F. Unless other arrangements are agreed upon, objects will be returned via the same method of shipment as they were sent.
- G. Damages, whether in transit or on the borrower's premises and regardless of cause, shall be immediately reported to the borrower's insurer and to the NMBGMR.
- H. Objects placed on public exhibit must be in locked or otherwise secure cases or, when large objects are involved, displayed so as to provide maximum security. Objects not on display must be stored in a secure area.
- I. Loan objects may not be cleaned, repaired, retouched, altered, or subjected to technical examination of any type involving risk of physical change except with the written permission of the Mineralogist. NMBGMR identifying marks on the items will not be removed.
- J. Objects covered by the Outgoing Loan Agreement may be photographed only for record and publicity purposes and/or for reproduction in an exhibition catalog or research publications, unless different restrictions are attached in writing. Two copies of the publication will be provided to the NMBGMR without cost and full credit will be given, as indicated on the loan agreement.

- K. The borrower will not reproduce the loaned objects in any media without written permission of the Mineralogist.
- L. Any request for use of a loaned object for promotional purposes that implies the endorsement of a product or service must be reviewed and approved in writing by the Mineralogist and the Director of the NMBGMR.
- M. NMBGMR reserves the right to set any additional conditions or restrictions related to the packing, shipping, insurance, exhibition installation, environmental controls, and security of the loan objects. The Museum also may require, at the expense of the borrower, that loan items be accompanied by a member of its staff who will supervise the care and handling, both outgoing and incoming. All conditions and restrictions shall be made in writing and attached to the loan agreement prior to approval of the loan.

III. Incoming Loan Procedures

- A. The Museum will exercise the highest professional standards of care for all loaned objects.
- B. Incoming loans will be made for a period of one year or less. If extensions to the initial period are warranted, they must be reviewed by the Mineralogist and written documentation of the extensions must be provided on a regular basis.
- C. The lender agrees that in the event of loss or damage to its loaned objects, recovery, if any, shall be limited to such amount as may be paid by the insurer. The lender releases the Museum and its officers, agents, and employees from liability for any and all claims arising out of such loss or damage.
- D. If damage or deterioration is noted during the loan, the lender will be notified at once. Should damage occur in transit, the carrier will also be notified and all packing materials saved for inspection.
- E. Loaned objects shall be maintained in the condition in which they are received. They will not be cleaned, repaired, or transported in damaged condition, except with the express permission of the lender, confirmed in writing, or when the safety of the object(s) makes such action imperative.
- F. Unless other arrangements are agreed upon, objects will be returned via the same method of shipment as they were sent.
- G. Unless the Museum is notified in writing to the contrary, it is understood that loaned objects may be photographed and reproduced in the Museum's publications and for publicity and development purposes.

- H. It is the responsibility of the lender to notify the Museum of changes in ownership of any loaned objects or of a change in return shipping address. Any failure to do so that results in the Museum's inability to return objects at the end of the loan period may be cause for considering such objects abandoned. In accordance with state law, abandoned materials become the property of the NMBGMR.

SECTION G: CONSERVATION PROCEDURES

I. Definitions

- A. Conservation is the practice of stabilizing an object, specimen, or collection by arresting those factors that cause its deterioration. This may involve laboratory treatment, correcting adverse environmental conditions, and assuring that use of objects, specimens, or collections is compatible with conservation objectives. The conservation profession is governed by a strict set of ethics and standards of practice.
- B. Preservation is defined as the actions taken to retard deterioration of, or prevent damage to, an object, specimen, or collection. This may involve correcting adverse environmental conditions and assuring that use of objects, specimens, or collections is compatible with preservation objectives (e.g. packing and shipping, storage and exhibition, accessibility, and handling).
- C. Maintenance is defined as the routine actions of appropriate storage, organization, monitoring, and general housekeeping for a collection to assure its stability, accessibility, and long-term utility.
- D. Restoration is defined as the actions taken to modify the existing materials and structure of an object or specimen to represent a known earlier state or appearance.
- E. Preparation is defined as the actions taken to enhance the utility of a specimen or collection for a specified use. There are established techniques used and final products created that conform to accepted standards of preparation. The specimen produced may represent only a portion of the original object or may be altered from its original state. Preparation techniques should be compatible with conservation objectives.
- F. A specimen is an object in its original state, one that has been prepared in an altered form, or both (e.g. an herbarium specimen is dried, flattened, and reshaped, yet seeds are left true to form).
- G. An artifact is a human-made item, often manufactured from naturally occurring materials, that was made for use in a cultural context.

II. Obligations to Collections

- A. Conservation of the permanent collections is governed by our public trust responsibility and by respect for the physical, historical, cultural, scientific, and aesthetic integrity of the object or specimen. Concern for its future should include protection against damage, loss, and alteration that might affect its future research, educational, or exhibition potential.
- B. Conservation of collections should be of the highest professional standard and quality of treatment.
- C. No treatment or act of intervention should be undertaken that is not appropriate to the long-term preservation of the object or specimen.
- D. Conservation/preparation techniques and materials should not endanger or obscure the true nature of the object or specimen and should not impede future treatment or retrieval of information through scientific investigation.
- E. Conservation/preparation techniques and materials selected should be those that are most easily and completely reversed and that least affect the original integrity of the objects or specimens. Any exceptions considered necessary for conservation or preparation must be fully justified.
- F. Nothing should be removed from an object or specimen without sufficient evidence that it is not part of the original condition of the object, except in special circumstances (e.g. preparation or sampling of specimens and artifacts).
- G. Before carrying out any treatment or refurbishment of an object or specimen, the following should occur: examination of the object or specimen and all available documentation, preparation of a condition assessment, compilation of the history of the object or specimen to determine the causes of its deterioration, and proposal for treatment approved by the Mineralogist. A record of methods and materials used must be made. Such records should be kept as a permanent, accessible archive. Each department has unique guidelines for modification of objects which may allow exceptions to the above procedures.
- H. Under most circumstances, it is unethical to modify or conceal the true nature of an object through restoration. The presence and extent of restoration should be detectable, although it need not be conspicuous. All restoration must be fully documented. It must be reversible, compatible, and unstressful to the object or specimen.
- I. It is standard practice to modify certain natural history specimens such as biological and geological materials that are prepared for research, educational, or

exhibition purposes (e.g. study skins, skeletons, taxidermy mounts, cut gems). the methods used should not impede subsequent collections care and conservation.

III. Staff Responsibilities

- A. The following are definitions and key duties for those staff most directly responsible for conservation of collections:
 - 1. The Mineralogist directs all aspects of the management, development, and use of collections and is responsible for enacting collections procedures, determining the research goals of collections, and ensuring the long-term preservation and vitality of collections.
 - 2. Museum professional staff assist the mineralogist in all aspects of management, development, and use of the collections.
 - 2. The student assistant is responsible for assistance in carrying out maintenance, registration, documentation, organization, and preservation of collections.
- B. Conservation treatment should be undertaken only within the limits of staff competence and facilities. Those staff responsible for conservation should keep abreast of the most recent literature and upgrade their skills accordingly to ensure the highest professional standards for collections.
- C. Preventative conservation, such as environmental control and proper storage, is the responsibility of all staff involved with collections care.
- D. All techniques and materials used in conservation must be fully disclosed.
- E. There should be a cooperative dialogue between conservators, curators, collections managers, exhibits personnel, and educators concerning all conservation practices.

IV. Use of Collections

- A. Whenever possible, use of collections should be compatible with conservation objectives. Research objectives may necessitate such intervention as sampling, destructive testing, and alteration (e.g. tissue for genetic analysis, paleontological and archaeological dating techniques, anatomical dissection, cross sectioning), but only when the potential for gaining knowledge by destructive means justifies sacrifice of the specimen. These procedures must be undertaken, in a controlled manner with approval by Museum staff. (See section on "Analytical Sampling.")
- B. Preservation of an object or specimen is paramount and must be balanced carefully with wise use. Certain objects or specimens may be considered too rare,

delicate, or significant for exhibition or loan (e.g. extinct species in poor condition).

- C. There is inherent risk to objects, specimens, or collections not only resulting from their use but also from storage, so that measures must be taken to minimize the level of risk (i.e. appropriate storage cabinetry, failsafe security, careful screening of borrowers, use of safe packing techniques, and detailed stipulations on collection transaction forms).
- D. Exhibition methodology and duration must consider the long-term preservation needs of the individual items in the permanent collection.
- E. Many specimens and artifacts in the collections of the NMBGMR Mineral Museum are inherently toxic or have been made hazardous through preparation or fumigation techniques. All collections should be used in a manner that protects the health and safety of staff, researchers, and visitors.

SECTION H: MINERAL MUSEUM INSPECTION REQUESTS

I. Guidelines

- A. Collections departments staff may provide information on objects brought to the Museum by the public for identification. Inspection Request forms must accompany objects submitted for this purpose. (Forms and procedures are found in Appendix 7)
- B. Identification or authentication services are not provided for any commercial purpose.

II. Procedures

A. Information Procedures

1. The visitor must complete an Inspection Request form and sign (see form in Appendix 7).
2. Contact the appropriate museum staff member, usually the Mineralogist, or assistants.
4. If an appropriate person is unavailable, ask the requestor if they would like to leave the object for inspection at a later date.

5. Give a copy of the Inspection Request form to the visitor if the object is being left for future inspection
6. Arrange to forward the object with the completed Inspection Request form to the appropriate personnel.
7. Following completion of the inspection, the Receptionist may be requested to hold the object for pick-up. The requestor's signature is required upon receipt of the object. Give the requestor a copy of the Inspection Request form.
8. The Inspection Request form will be filed with the Mineralogist.

B. Museum Procedures

1. Upon completion of the inspection, the department should notify the requestor by mail.
2. Remind the requestor that the object must be picked up within 90 days as stated on the Inspection Request form.
3. Arrange a convenient date for the visitor to pick up the object in the department or the Information Desk. In some situations, the object may be returned through the mail. Send either by certified or registered mail to ensure a return receipt. The requestor should be invoiced to cover postage and handling.
4. The requestor's signature is required upon receipt of the objects. Give the requestor two copies of the Inspection Request form and request signature and return of one copy.

SECTION I: PHOTOGRAPHY (STILL, FILM, VIDEO)

I. Guidelines for Photographing Museum Exhibits and Public Areas

- A. To minimize handling and possible damage to exhibits/objects, visitors are encouraged to purchase existing photographs or have photographs made by the Museum staff.
- B. During public hours, visitors may take photographs and videotapes with their own equipment, free of charge, for personal, educational, or non-commercial purposes. Photographs taken by visiting photographers may not be published without written permission from the NMBGMR. If permission is granted, an acknowledgment to the Museum and NMBGMR must be given in the publication.

- C. The visiting photographer assumes all liability and financial responsibility for any injury, loss, or damage that may result from activities related to the photography.
 - 1. The safety, general convenience, and/or traffic flow of the visiting public must not be obstructed through the use of photographic equipment such as tripods, external lights, electrical wires, etc.
 - 2. Visitors are not allowed to photograph from inside an exhibit or touch objects on exhibit without express written permission obtained in advance from Museum curatorial personnel. No equipment, clothing, etc., may be placed on any Museum case, exhibit, or object.
- D. Some exhibits/objects may be subject to restrictions of loan agreement provisions or copyright issues.
- E. Written permission from curatorial staff for the handling of individual objects that are on public display, setting up equipment during non-public hours, or other special privileges is required. Fees for services may be charged.

II. Guidelines for Photographing Museum Study Collections

- A. To minimize handling and possible damage to study collection objects, researchers are encouraged to purchase existing photographs or have photographs made through the Museum staff. If existing photographs are not adequate, special photography by the Museum's staff may be requested. An estimate of charges for this service must be obtained and agreed upon prior to the scheduling of any special photographic work.
- B. Researchers may be allowed to take photographs for purposes of study with their own equipment after receiving approval from the Mineralogist.
- C. For publication of photographs, refer to section I.A above.

III. Procedures for Photographing Exhibits/Objects

- A. A specific label will designate exhibits/objects that may not be photographed.
- B. Application for permission to publish photographs or to handle individual objects on public display, set up equipment during non-public hours, or other special privileges should be made in writing to the Mineralogist.
- C. Final approval for the handling of objects must be obtained from the Mineralogist and Director of the NMBGMR, if permission is granted, fees for personnel services may be charged as set forth on the application form (see form and procedural instructions in Appendix 1).

SECTION J: TAX DEDUCTIONS AND MONETARY APPRAISALS

I. Guidelines

- A. Donations to the Museum are tax-deductible as charitable contributions in accordance with current Internal Revenue Service (IRS) regulations on file in the NMBGMR Mineral Museum. The Museum is qualified to accept donations that further its scientific and educational functions. The donation must be immediate and unconditional for the donor to receive a deduction for the year. Donors should be referred to current IRS publications dealing with charitable contributions.
- B. The Museum must fulfill certain record-keeping requirements for the IRS on objects received by donation for which the donor is taking a deduction for a charitable contribution. If the donation is valued in excess of \$5,000, IRS Form 8283, Section B, Part I (Donee Acknowledgment) should be completed by the Museum (a copy of the form is in Appendix 8).
- C. Museum personnel may provide appraisals for donations less than \$5000. However, all appraisals made by museum personnel must be considered unofficial and not legally binding. Donors must have an independent appraisal made for their own tax deduction purposes. It is customary for Museum personnel to know the appraised value at the time of donation and to keep this confidential information on file. The appraised value and amount of deduction is primarily between the donor and the IRS; however, in some cases, an appraisal report may help to authenticate property being donated.
- D. It is recommended that the above IRS regulations be used as a basis for keeping Museum records and acknowledging donations. The Museum's Donation Record form must be completed in its entirety and the donor provided a copy thereof (see Section C).
- E. Donations must be retained by the Museum for a period of not less than two years for a donor to declare a tax deduction. If the property donated is not retained by the Museum after the three-year period, a Record of Disposition form must be filled out (see Section D).

II. Procedures

- A. Complete IRS Form 8283.
 - a. Fill in donation date, Museum name, address, and employer identification number (84-051-8447).
 - b. The Curator-in-Charge and/or the Director is designated to sign the form.

- B. Return the completed form to the donor and retain a copy for the Museum files.
- C. Complete the Donation Record form (see Section C).
- D. Complete the Record of Disposition form, if applicable (see Section D).

SECTION K: OBSERVANCE OF LAWS, REGULATIONS AND GUIDELINES

I. International Guidelines

- A. Protection of objects of archaeological, historical, and ethnological interest is addressed by Section 4.4 of the International Council of Museums Code of Professional Ethics (1986), and by The Protection of Cultural Property (compiled by Bonnie Burnham, International Council of Museums, 1974).
- B. The Museum observes the UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property (1970) and the Convention for the Protection of Cultural Property in the Event of Armed Conflict (The Hague Convention, 1954).
- C. The Museum observes all wildlife regulations addressed in the Convention on International Trade in Threatened and Endangered Species of Wild Fauna and Flora.

II. Federal, State, and Professional Guidelines

A. Anthropological Collections

- 1. Repatriation Laws pertaining to archaeological collections and cultural resources
 - a. Native American Grave Protection and Repatriation Act (HR 5237 adopted October 15, 1990)
 - b. AAM Policy on the Repatriation of Native American Ceremonial Objects and Human Remains (adopted January 15, 1988)
- 2. Antiquities and Cultural Resources
 - a. Antiquities Act of 1906
 - b. Federal Land Management Policy Act of 1979
 - c. Resources Protection Act of 1979 (36 CFR 300) pertaining to Advisory Council on Historic Preservation and Protection of Historic and Cultural Resources
 - d. Standards and Guidelines for Archaeology and Historic Preservation (Federal Register 48(190):44716-44740)
- 3. Curation

- a. Code of Federal Regulations (36 CFR 79; 36 CFR 2.1) pertaining to curation of federally-owned and administered archaeological collections
 - 4. Professional Guidelines and Ethics
 - a. Society of Professional Archaeologists
 - b. Colorado Council of Professional Archaeologists By-laws and Code of Ethics (adopted 1978, revised 1990)
- B. Earth Sciences Collections
 - 1. Paleontological and Paleoarchaeological Materials
 - a. Antiquities Act of 1906
 - b. Federal Land Management Policy Act of 1979
 - c. Native American Grave Protection and Repatriation Act
 - 2. Professional Guidelines and Ethics
 - a. Current published procedures and guidelines of the Bureau of Land Management, National Park Service, and the United States Forest Service
- III. Copies of the above documents are available in the Curator-in-charges office, University Library, and/or the main offices of the NMBGMR.

SECTION L: SELLING OBJECTS IN MUSEUM SALES CASE

- I. Guidelines
 - A. Natural history objects of scientific or historical significance including, but not limited to, rare fossils or mineral specimens, wildlife materials such as rare butterflies or shells, and prehistoric cultural artifacts such as projectile points will not be sold in the Museum retail shops. The more common varieties of mineral specimens, fossils, some historical artifacts, and publications may be sold in the sales case of the museum. All proceeds shall go to the purchase of mineral or historical objects to benefit the museum.
 - B. Natural history objects will not be sold in Museum retail shops that have not met all provisions for legal acquisition (see Section C).

- C. Retail shop inventory is subject to oversight by the Director to determine the appropriateness of natural history objects offered for sale.
- D. Replicas offered for sale must be clearly marked as such.
- E. All markings of previous ownership may be present on natural history objects for sale.

II. Procedures

- A. It is the responsibility of the Mineralogist to seek advice from the Museum Advisory Committee to ensure that all natural history objects purchased commercially by the Museum for the sales case are not restricted.
- B. All proceeds from sales from the sales case must be deposited in the appropriate accounts within 24 hours of sale.
- C. A record of all sales shall be kept by a consecutively numbered receipt book.
- D. A record of all deposits shall be kept in a consecutively numbered deposit book.
- E. All deposit receipts shall be kept with each numbered deposit slip.
- F. A physical sales inventory shall be made once a year, on the anniversary of the fiscal year, July 1.

SECTION M: ETHICS

I. Guidelines

- A. The Collections Procedures manual is based on several significant museum ethics codes and policies. These statements represent the consensus of Museum staff and Board of Trustees, the museum profession, and pertinent scientific disciplines in regard to ethical conduct in the museum environment. Conscientious individuals should be guided by these policies in carrying out their responsibilities to the collections, to the Museum, and to the public trust.

II. Copies of the following documents are available in the Curator-in-charge, Director's Office, and University Library.

- A. New Mexico Institute of Mining and Technology Ethics Policy Statement is the primary ethics document. All collections procedures conform to these guidelines.
- B. American Association of Museums Museum Ethics (1991) is an important guideline.

- C. International Council of Museums Code of Professional Ethics (1986) provides general ethics principles for collections.
- D. Codes of Ethics of professional specialties in the museum field constitute guidelines for various NNMBGMR. staff who work in those specialties.
 - 1. Curators' Code of Ethics (1983), formulated by the Curators' Committee of the American Association of Museums, guides all curatorial staff.
 - 2. A Code of Ethics for Archivists (1980), formulated by the Society of American Archivists, is adhered to by the Archives Department.
 - 3. American Institute of Conservation Code of Ethics and Standards of Practice (1990) guides the Museum conservator.
 - 4. A Code of Ethics for Registrars (1985), formulated by the Registrars' committee of the American Association of Museums, provides guidelines for collections management staff.
 - 5. The Museum Store Association Code of Ethics (1982) contains guidelines for museum sales.